



Filing ID #10020695

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Daniel Helmer  
**Status:** Congressional Candidate  
**State/District:** VA10

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2018  
**Filing Date:** 06/22/2018  
**Period Covered:** 01/01/2017– 05/31/2018

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
BCG Employees' Profit Sharing Retirement Fund ⇒ Vanguard Target Retire 2045 Tr II [MF]		\$50,001 - \$100,000	Tax-Deferred		
Hansome Energy Systems [PS]  DESCRIPTION: Electrical Machinery Systems; Linden, New Jersey		\$50,001 - \$100,000	Dividends	\$5,001 - \$15,000	\$5,001 - \$15,000
Rental Property located in Wenonah, NJ [RP]  LOCATION: Wenonah, NJ, US	JT	\$100,001 - \$250,000	Rent	\$2,501 - \$5,000	\$5,001 - \$15,000
USAA 529 College Savings Plan (DC1) ⇒ Age Based Option 7-8: Moderately Aggressive Portfolio [MF]	DC	\$15,001 - \$50,000	Tax-Deferred		
USAA 529 College Savings Plan (DC2) ⇒ Age Based Option 9-11: Moderate Portfolio [MF]	DC	\$15,001 - \$50,000	Tax-Deferred		
USAA Federal Savings Bank Accounts [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
USAA IRA ⇒ FDIC Insured Account - IRA QRETQ [IH]		\$1,001 - \$15,000	Tax-Deferred		
USAA IRA ⇒ PowerShares QQQ [MF]		\$15,001 - \$50,000	Tax-Deferred		
USAA Roth IRA ⇒ Cornerstone Moderate Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		
USAA Roth IRA ⇒ Emerging Markets Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		
USAA Roth IRA ⇒ Extended Market Index Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		
USAA Roth IRA ⇒ High Income Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		
USAA Roth IRA ⇒ Nasdaq-100 Index Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		
USAA Roth IRA ⇒ S&P 500 Index Fund Member Shares [MF]		\$1,001 - \$15,000	Tax-Deferred		
USAA Roth IRA ⇒ Science & Technology Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		
USAA Roth IRA ⇒ Target Retirement 2050 Fund [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
USAA Roth IRA ⇒ Treasury Money Market Trust [MF]		\$1,001 - \$15,000	Tax-Deferred		
USAA Roth IRA ⇒ World Growth Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		
Zurich American Life Insurance Company [OT] DESCRIPTION: Variable Life Insurance Policy		\$1,001 - \$15,000	Tax-Deferred		

\* Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

## SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Boston Consulting Group, Inc.	Salary	N/A	\$121,000.00
Faifax County Public Schools	Spouse Salary	N/A	N/A

**SCHEDULE D: LIABILITIES**

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	U.S. Bank National Association	02/2009	Mortgage on Rental Property	\$100,001 - \$250,000

**SCHEDULE E: POSITIONS**

Position	Name of Organization
Board Member (uncompensated)	West Point Jewish Chapel Fund

**SCHEDULE F: AGREEMENTS**

Date	Parties To	Terms of Agreement
May 2017	Daniel Helmer; Boston Consulting Group, Inc.	Offer of employment at the end of candidacy which terminates if elected to Congress or within 3 months of the end of candidacy

**SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE**

None disclosed.

**SCHEDULE A ASSET CLASS DETAILS**

<ul style="list-style-type: none"> <li>BCG Employees' Profit Sharing Retirement Fund</li> <li>USAA 529 College Savings Plan (DC1) (Owner: DC) LOCATION: VA</li> <li>USAA 529 College Savings Plan (DC2) (Owner: DC) LOCATION: VA</li> <li>USAA IRA</li> <li>USAA Roth IRA</li> <li>USAA Roth IRA (Owner: SP)</li> </ul>
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**EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION**

**Trusts:** Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?

☐ Yes ☒ No

**Exemption:** Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption?

☐ Yes ☒ No

## **CERTIFICATION AND SIGNATURE**

☒ I CERTIFY that the statements I have made on the attached Financial Disclosure Report are true, complete, and correct to the best of my knowledge and belief.

**Digitally Signed:** Daniel Helmer , 06/22/2018